



5 COORDINATION/INTEGRATION
5.7 Information and Referrals

Effective: 7/1/97
Revised: 3/1/98

POLICY: Local WIC projects should establish an information and referral system for WIC participants who need additional services.

PROCEDURE:

A. DEFINITIONS

1. Provision of information: The provision or availability of written or verbal information about a service/program with the expectation that the participant/proxy will decide whether or not s/he wants to participate in the service/program.
2. Informal referral: Recommendation to a participant/proxy to make an appointment for needed services, made either verbally or in writing, but does not require follow-up. This includes walking with the participant/proxy down the hall to another provider for services.
3. Formal referral: Recommendation to a participant/proxy that is made in writing on an established referral form, preferably an agency form, and includes follow-up to see if the participant contacted the agency for services. This includes a referral in which the WIC provider contacts the program/service on the participant's behalf.

B. PROCEDURES

Procedures for the provision of information and referrals.

1. The project should have written procedures in place to assure the provision and documentation of information and referrals as required in other policies in this chapter.
2. Decisions regarding the method (i.e., provision of information, an informal referral, or a formal referral) for individual participants should be made considering the complexity of entry into the other programs/services, the methods the other programs/services prefer, and how comfortable WIC staff feel that the participant will follow through. Because the goal is for the participant to obtain the services needed, the method used does not really matter. Use the method that best assures the follow-through desired.
3. The following are referral procedures adapted from information in the WI Medical Assistance Program Prenatal Care Coordination Program: Guidelines and



Performance Measurement which may be useful in developing local WIC project procedures:

- a) Establish the participant's clear understanding of the reason and need for the referral.
 - b) Determine the participant's agreement to work together on the referral.
 - c) Inform the participant of any choices available for the referral.
 - d) Clarify what the referral may provide and specify any limitations.
 - e) Assist the recipient in learning to independently access the referral source, including skills in effective use of contact names, telephone, and address information.
 - f) Determine with the participant the date(s) and methods the staff will use to follow-up on the referral; obtain written consent for release of information (see the WIC Confidentiality policy).
 - g) Follow-up with the participant as agreed upon.
 - h) Follow-up with the referral agency providing appropriate advocacy on behalf of the recipient to see that services are received.
 - i) Timely follow-up on referrals should be made as dictated by the urgency of the circumstances (Within 3 weeks is recommended by Prenatal Care Coordination).
 - j) Maintain written documentation in the recipient's chart of all referral activities, including dates and initials for each chart entry.
4. Projects should use the information obtained as required in Policy 5.2 to determine information, referral, and coordination procedures needed to improve services to WIC participants.
 5. See the Confidentiality Policy in the Administration Chapter for policies and procedures pertaining to disclosure of participant information (e.g., what to include in a release form).



C. QUALIFICATIONS OF STAFF PROVIDING REFERRALS

1. The Registered Dietitian (RD), Certified Dietitian (CD), or nurse shall initiate or coordinate referrals to health care providers outside the agency (e.g., to pediatric and obstetric care).
2. Other staff may initiate or coordinate referrals to other services, e.g., immunization representatives, human/social service programs.

D. REFERRAL/RELEASE FORMS

1. It is recommended that agencies develop their own referral form for referring *from* WIC. See the Confidentiality policy for requirements regarding what must be included on a referral form.
2. The WIC Medical Referral Form (see Attachment in Policy 2.8) is an optional form that may be used to refer/disclose information from other health care providers *to* WIC.